

The 3-Step Blueprint to Becoming Irresistibly Referrable in 15 Minutes Flat



AskMyAdvisor®
By Invitation

Effortless Referrals

Make it incredibly simple for clients to refer you by eliminating any barriers that could hold them back (refer to the image for clarity).



SIMPLICITY



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EXCLUSIVITY

Exclusive Referral Channel Choose a single referral channel, such as a private email, phone number, or a unique URL (we recommend a URL). This channel should be reserved exclusively for your top clients and their COI.



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Invitation-Only Access Restrict access to your referral channel by making it invitation-only for your top 20% clients and their COI. This guarantees that only the most valuable clients and referrals connect with you through this channel.



BY-INVITATION



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Same-day referrals on autopilot in three steps



Pick your referral channel from Step #2.



Create an invite list of your top 10 clients.



Send an email to your invitees, granting them and their COI private Q&A access with you.



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IMPORTANT

Emphasize the exclusivity of this Q&A channel, it's only open to invited clients and their COI.

As a result of this simple, 3-step blueprint, your top clients will enjoy the recognition they've earned and have a designated path to refer you to their COI.

By providing Q&A access, you'll simplify these clients sharing new needs while simplifying the referral process for their COI to reach out to you, frictionlessly.

